



# Operational Rhythm & Consistency Field Guide

A navigable, aligned and practical way to strengthen operational conversations and build daily consistency.



# Contents

Use the route cards for context, then use the coaching pages to strengthen delivery.

## HOW TO USE THIS GUIDE

Start with the two-page daily field card. Choose one audience, use one short opener, listen, offer one useful step and record the blocker.

## START HERE

|    |                                 |       |
|----|---------------------------------|-------|
| 03 | Quick start + daily field card  | p. 03 |
| 04 | Operational Rhythm workflow     | p. 04 |
| 05 | Compliance + quality guardrails | p. 05 |
| 06 | Objection handling              | p. 06 |

## ROUTE CARDS

|    |                                 |       |
|----|---------------------------------|-------|
| 07 | Frontline team members          | p. 07 |
| 08 | Team leaders & supervisors      | p. 08 |
| 09 | New starters & onboarding       | p. 09 |
| 10 | Cross-shift handover            | p. 10 |
| 11 | Quality & QA reviewers          | p. 11 |
| 12 | SLA breach conversations        | p. 12 |
| 13 | Error & exception review        | p. 13 |
| 14 | Customer escalation handlers    | p. 14 |
| 15 | Workflow owners & process leads | p. 15 |

## COACHING + LIBRARY

|       |                                      |          |
|-------|--------------------------------------|----------|
| 16    | Dialogue examples                    | p. 16    |
| 17    | Listen, clarify and respond          | p. 17    |
| 18    | Channel-ready conversation starters  | p. 18    |
| 19    | Respectful exits and stop signals    | p. 19    |
| 20-24 | Condensed prompt library             | p. 20-24 |
| 25    | Manager coaching and role-play       | p. 25    |
| 26    | Measure definitions and conversion   | p. 26    |
| 27    | Measure + improve                    | p. 27    |
| 28    | Daily Rhythm & Consistency worksheet | p. 28    |

# Quick start + daily field card

Short, natural and useful. Use one line, then listen.

1 CONTEXT

2 ASK

3 LISTEN

4 CLARIFY

5 OFFER

6 AGREE

7 RECORD

## TOP CONVERSATIONS FOR TODAY

### FRONTLINE TEAM MEMBERS

#### OPENER

"How is today's workload sitting with you?"

#### CLARIFY

"Which part of the process feels slowest right now?"

#### NEXT STEP

"Would it help to walk through that step together?"

### TEAM LEADERS & SUPERVISORS

#### OPENER

"How is the team tracking against SLA today?"

#### CLARIFY

"Where is the queue building up?"

#### NEXT STEP

"Let's agree what to reprioritise for the next block."

### NEW STARTERS

#### OPENER

"How are you finding the workflow so far?"

#### CLARIFY

"Which step still feels unclear or slow?"

#### NEXT STEP

"I can walk through that step with you now."

### QUALITY & QA REVIEWERS

#### OPENER

"What's the pattern in recent reviews?"

#### CLARIFY

"Is it a training gap or a process gap?"

#### NEXT STEP

"Let's agree what to flag in the next huddle."

#### LISTEN FOR

Bottlenecks, unclear ownership, workarounds, time pressure and the step people quietly skip.

# Operational Rhythm workflow

The conversation is one part of the outcome. Use the full loop.

## 01 PREPARE

5-10 MIN

- Choose one stage or one team member.
- Check today's SLA and volume position.
- Note what "good" looks like for this step.
- Confirm ownership and escalation path.

## 02 STAND-UP

10-15 MIN

- Surface blockers before they compound.
- Ask one clarifying question, then pause.
- Do not solve before you understand.
- Separate a one-off from a pattern.

## 03 RECORD

IMMEDIATELY

- Capture the blocker and its cause.
- Record the action and owner.
- Note anything needing escalation.
- Do not record unnecessary detail.

## 04 FOLLOW UP

AGREED DATE

- Send only the outcome and action.
- Use the agreed channel.
- Keep it short and specific.
- Close the loop with the team.

## 05 MEASURE

WEEKLY

- SLA performance by stage.
- Error and exception rate.
- Rework volume.
- Which blocker recurs most?

## MINIMUM CAPTURE

FIELD CAPTURE EXAMPLE

|                        |                               |                                    |
|------------------------|-------------------------------|------------------------------------|
| <b>Blocker / cause</b> | What is slowing the step down | Unclear handover instructions      |
| <b>Next step</b>       | Smallest agreed action        | Update the handover template today |
| <b>Date / channel</b>  | When and how                  | Stand-up tomorrow morning          |
| <b>Owner</b>           | Who is accountable            | Team leader, shift B               |

# Compliance + quality guardrails

Use the prompts as conversation aids. Confirm current internal requirements before deployment.

## SAFER WORDING

| AVOID                               | RISKY EXAMPLE                               | USE INSTEAD                      | SAFER WORDING                                                   |
|-------------------------------------|---------------------------------------------|----------------------------------|-----------------------------------------------------------------|
| <b>Avoid blaming individuals</b>    | "You keep getting this wrong."              | <b>Name the process gap</b>      | "This step seems to trip a few people up — let's look at why."  |
| <b>Avoid vague urgency</b>          | "We need to go faster."                     | <b>Name the specific target</b>  | "We're tracking behind SLA on this stage by 20 minutes."        |
| <b>Avoid informal workarounds</b>   | Skipping a step to save time                | <b>Escalate the friction</b>     | "If this step is slowing things down, let's raise it properly." |
| <b>Avoid guessing at root cause</b> | "It's probably just a training issue."      | <b>Confirm before concluding</b> | "Let's check whether this is training, tooling or process."     |
| <b>Avoid public correction</b>      | Correcting a team member in front of others | <b>Move it private</b>           | "Can we have a quick chat after this?"                          |
| <b>Avoid silent scope creep</b>     | Absorbing extra work without flagging it    | <b>Make load visible</b>         | "This is now outside what we scoped — let's flag it."           |

## CHANNEL HYGIENE

- Confirm ownership before reassigning work across the team.
- Respect escalation pathways for customer-impacting issues.
- Use approved templates for handover and incident notes.
- Escalate any customer harm, safety or conduct issue through the appropriate internal process.
- A rhythm conversation should surface issues, not resolve them informally on the spot.

### PRE-FLIGHT

SLA position checked? Blocker understood?  
Owner confirmed? Clear next step?

### STOP / ESCALATE

Customer harm, a safety issue, a conduct concern, or a request outside your role? Pause and use the right internal process.

### TRUST CHECK

**A stand-up surfaces issues. It does not replace the proper escalation or incident process.**

# Objection handling

Acknowledge, clarify only if useful, offer a choice, then give control back.

## RESPONSES THAT KEEP TRUST INTACT

|                                                       |                              |                                                                           |
|-------------------------------------------------------|------------------------------|---------------------------------------------------------------------------|
| <b>"We don't have time for a stand-up today."</b>     | That pressure is understood. | Two minutes now usually saves longer delays later — let's keep it short.  |
| <b>"This is just how we've always done it."</b>       | That's useful context.       | Let's check if it's still the fastest way, now that volumes have changed. |
| <b>"It's not my part of the process."</b>             | Fair point.                  | Let's find out whose part it is, so it doesn't sit unowned.               |
| <b>"Can't we just push it through this once?"</b>     | I hear the pressure.         | Let's flag it properly rather than build a workaround.                    |
| <b>"The numbers look fine to me."</b>                 | Good starting point.         | Let's check what's behind the number before we move on.                   |
| <b>"I don't understand why this keeps happening."</b> | That's a fair question.      | Let's walk through it together and find where it's breaking down.         |

### THE RULE

A recurring issue is a process signal, not a personal one. Name it, record it, and use the right pathway to fix it.

# Frontline team members

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Frontline team members working through daily volume.

## THE AIM

Surface friction early so it doesn't compound into backlog.

### 1 START LIGHT

### 2 LISTEN FOR THE BLOCK

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"How is today's workload sitting with you?"

### FOLLOW-UP

"Which part of the process feels slowest right now?"

### CLOSE

"Would it help to walk through that step together?"

## IN PRACTICE

Team member: "This step keeps stalling on me."  
Leader: "So it's the handover, not the work itself."  
Team member: "Exactly — the instructions are unclear."

## MORE OPTIONS

### 01 ALTERNATIVE

What's taking longer than it should today?

### 02 ALTERNATIVE

Is there a step you have to double-check every time?

### 03 ALTERNATIVE

Would a second pair of eyes help right now?

### 04 ALTERNATIVE

Is the volume or the process the bigger issue?

### 05 ALTERNATIVE

How confident do you feel with this step?

### 06 ALTERNATIVE

What would make today easier?

## GUARDRAIL

Surface friction, don't assign blame. A blocker is a process signal.

# Team leaders & supervisors

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Team leaders and supervisors tracking SLA and workload.

## THE AIM

Catch queue build-up early enough to rebalance the day.

### 1 CHECK POSITION

### 2 LISTEN FOR THE RISK

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"How is the team tracking against SLA today?"

### FOLLOW-UP

"Where is the queue building up?"

### CLOSE

"Let's agree what to reprioritise for the next block."

## IN PRACTICE

Leader: "Stage two is running behind."  
Supervisor: "Is that volume or a blocker?"  
Leader: "A blocker — one system step is slow today."

## MORE OPTIONS

### 01 ALTERNATIVE

What's the biggest risk to SLA today?

### 02 ALTERNATIVE

Where would extra hands help most?

### 03 ALTERNATIVE

Is this volume, a blocker, or a gap in coverage?

### 04 ALTERNATIVE

What's the plan if this doesn't clear by midday?

### 05 ALTERNATIVE

Would a short huddle help align the team?

### 06 ALTERNATIVE

What's worked well on busy days like this before?

## GUARDRAIL

Rebalance transparently. Don't reassign work without telling the team why.



# New starters & onboarding

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

New starters building confidence in the workflow.

## THE AIM

Build capability through guided practice, not just instructions.

### 1 START LIGHT

### 2 LISTEN FOR THE GAP

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"How are you finding the workflow so far?"

### FOLLOW-UP

"Which step still feels unclear or slow?"

### CLOSE

"I can walk through that step with you now."

## IN PRACTICE

New starter: "I'm not sure I did that step right."

Coach: "What made you unsure?"

New starter: "The order of the checks."

## MORE OPTIONS

### 01 ALTERNATIVE

What's felt most confusing this week?

### 02 ALTERNATIVE

Which step would you like to see again?

### 03 ALTERNATIVE

What's a mistake you're worried about making?

### 04 ALTERNATIVE

Would shadowing someone help?

### 05 ALTERNATIVE

How does this compare to what you expected?

### 06 ALTERNATIVE

What would help you feel more confident by Friday?

## GUARDRAIL

Confidence builds over weeks, not days. Normalise questions rather than discourage them.

# Cross-shift handover

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Teams handing work over between shifts.

## THE AIM

Make sure context transfers cleanly, not just the task list.

### 1 START LIGHT

### 2 CONFIRM STATUS

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"What does the next shift need to know?"

### FOLLOW-UP

"Is anything time-sensitive or still open?"

### CLOSE

"Let's write that down before the shift changes."

## IN PRACTICE

Outgoing: "This one's still waiting on a callback."

Incoming: "What time was it logged?"

Outgoing: "9:40 — I'll note that in the handover."

## MORE OPTIONS

### 01 ALTERNATIVE

What's commonly missed at handover?

### 02 ALTERNATIVE

Is everything written down, not just remembered?

### 03 ALTERNATIVE

What's time-sensitive for the next shift?

### 04 ALTERNATIVE

Would a standard handover template help?

### 05 ALTERNATIVE

What causes the most rework across shifts?

### 06 ALTERNATIVE

How can the handover note be clearer?

## GUARDRAIL

A clean handover protects the customer as much as the next shift.

# Quality & QA reviewers

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Quality and QA reviewers assessing completed work.

## THE AIM

Turn review findings into a pattern the team can act on.

### 1 START LIGHT

### 2 LISTEN FOR THE PATTERN

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"What's the pattern in recent reviews?"

### FOLLOW-UP

"Is it a training gap or a process gap?"

### CLOSE

"Let's agree what to flag in the next huddle."

## IN PRACTICE

QA: "The same step keeps getting missed."

Leader: "Is that one person or the whole team?"

QA: "Spread across the team — likely the instructions."

## MORE OPTIONS

### 01 ALTERNATIVE

What's the most common finding this week?

### 02 ALTERNATIVE

Is this isolated or a wider pattern?

### 03 ALTERNATIVE

Would a refreshed checklist help?

### 04 ALTERNATIVE

What's the impact if this isn't addressed?

### 05 ALTERNATIVE

How should this be fed back to the team?

### 06 ALTERNATIVE

What's improved since the last review cycle?

## GUARDRAIL

Feed findings back as patterns, not individual call-outs.

# SLA breach conversations

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Conversations following a missed SLA or deadline.

## THE AIM

Understand the cause before deciding what changes.

### 1 START LIGHT

### 2 LISTEN FOR THE CAUSE

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"What happened with this one?"

### FOLLOW-UP

"Was it volume, a blocker, or something else?"

### CLOSE

"Let's agree what we'd do differently next time."

## IN PRACTICE

Leader: "This breached SLA by two hours."

Team member: "The system was down for part of the morning."

Leader: "That's useful — let's note that as the cause."

## MORE OPTIONS

### 01 ALTERNATIVE

What was different about this one?

### 02 ALTERNATIVE

Was this predictable or a surprise?

### 03 ALTERNATIVE

What would have caught this earlier?

### 04 ALTERNATIVE

Is this a one-off or a recurring risk?

### 05 ALTERNATIVE

Who needs to be aware of this breach?

### 06 ALTERNATIVE

What would prevent a repeat?

## GUARDRAIL

Understand the cause before assigning consequence. Record the reasoning either way.

# Error & exception review

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Team members and leaders reviewing an error or exception.

## THE AIM

Separate the error from the person, and find the fix that sticks.

### 1 START LIGHT

### 2 LISTEN FOR CONTEXT

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"Talk me through what happened."

### FOLLOW-UP

"What did you notice at the time?"

### CLOSE

"Let's figure out what would catch this earlier next time."

## IN PRACTICE

Team member: "I didn't notice until it was flagged."  
Leader: "What would have made it more visible?"  
Team member: "A prompt before the final step, maybe."

## MORE OPTIONS

### 01 ALTERNATIVE

What did the process look like in this case?

### 02 ALTERNATIVE

Was there a check that could have caught this?

### 03 ALTERNATIVE

Is this the first time, or has it happened before?

### 04 ALTERNATIVE

What would you do differently next time?

### 05 ALTERNATIVE

Would a checklist prompt help here?

### 06 ALTERNATIVE

What support would help you feel confident again?

## GUARDRAIL

Review the error, not the person. Fix the system where the system is the cause.

# Customer escalation handlers

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Team members handling an escalated customer issue.

## THE AIM

Resolve or route the issue without absorbing unmanaged pressure.

### 1 START LIGHT

### 2 LISTEN FOR THE ISSUE

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"What's the customer's main concern?"

### FOLLOW-UP

"Is this something we can resolve, or does it need escalation?"

### CLOSE

"Let's agree the next step and who owns it."

## IN PRACTICE

Handler: "The customer wants a call back today."

Leader: "Is that realistic given the queue?"

Handler: "With help, yes — I'll need someone to cover mine."

## MORE OPTIONS

### 01 ALTERNATIVE

What's already been tried with this customer?

### 02 ALTERNATIVE

Is this within your authority to resolve?

### 03 ALTERNATIVE

What would a fair outcome look like here?

### 04 ALTERNATIVE

Who else needs to be looped in?

### 05 ALTERNATIVE

What's the risk if this isn't resolved today?

### 06 ALTERNATIVE

Would a warm handover to a specialist help?

## GUARDRAIL

Escalate within your authority. Don't absorb pressure that belongs to a different pathway.

# Workflow owners & process leads

Recommended sequence first; additional prompts retained for different situations.

## USE THIS WITH

Process leads reviewing whether a workflow still fits how the team works.

## THE AIM

Keep the process aligned to reality, not just to how it was designed.

### 1 START LIGHT

### 2 LISTEN FOR THE GAP

### 3 OFFER ONE NEXT STEP

## RECOMMENDED STARTING SEQUENCE

### OPENER

"Does this workflow still match how the team actually works?"

### FOLLOW-UP

"Where does it feel forced or slow?"

### CLOSE

"Let's map a small change and test it for a week."

## IN PRACTICE

Process lead: "This step was designed for lower volume."  
Team leader: "It shows — everyone works around it now."  
Process lead: "Then let's redesign it properly."

## MORE OPTIONS

### 01 ALTERNATIVE

Where do people quietly work around the process?

### 02 ALTERNATIVE

Has volume or context changed since this was designed?

### 03 ALTERNATIVE

What would the team change if they could?

### 04 ALTERNATIVE

Would a small pilot change be worth testing?

### 05 ALTERNATIVE

What's the risk of leaving this as-is?

### 06 ALTERNATIVE

Who else should be part of redesigning this?

### GUARDRAIL

A workaround is feedback. Redesign the process rather than policing the workaround.

# Dialogue examples

Short examples of context, listening, reflection and one agreed step.

## FRONTLINE TEAM MEMBER

Leader: "How is today's workload sitting with you?"

Team member: "This step keeps stalling on me."

Leader: "Then let's look at the handover, not just the workload."

## TEAM LEADER

Supervisor: "How is the team tracking against SLA today?"

Leader: "Stage two is running behind."

Supervisor: "Let's reprioritise the next block around that."

## NEW STARTER

Coach: "Which step still feels unclear?"

New starter: "The order of the checks."

Coach: "Let's walk through that together now."

## QUALITY REVIEWER

QA: "The same step keeps getting missed."

Leader: "Is that one person or the whole team?"

QA: "Spread across the team — likely the instructions."

## SLA BREACH

Leader: "This breached SLA by two hours."

Team member: "The system was down part of the morning."

Leader: "That's useful — let's record that as the cause."

## FIRM ESCALATION

Team member: "Can't we just push this through this once?"

Leader: "I hear the pressure. Let's flag it properly instead."

Leader note: Record the request and route it through the right process.

## COACH FOR

Short questions, a real pause, accurate reflection, clear cause and one specific next step.



# Listen, clarify and respond

The opener starts the conversation. Listening creates the value.

## 1 CONTEXT

Explain why you are asking.

*"When we spoke this morning, the queue was building."*

## 2 ASK

Use one open question.

*"What's changed since then?"*

## 3 REFLECT

Play back the meaning, not every word.

*"It sounds like the handover is the real blocker."*

## 4 CLARIFY

Check priority, impact and risk.

*"What would you most like fixed first?"*

## 5 SUMMARISE

Confirm that you understood.

*"So the gap is the instructions, not the workload."*

## 6 OFFER

Ask permission and offer a choice.

*"Would a quick walkthrough or a written update help more?"*

## 7 AGREE

Confirm action, owner, date and channel.

*"I'll update the template today and check in tomorrow."*

### AVOID

Stacking questions, solving too early, assigning blame, or treating silence as something to fill.

# Channel-ready conversation starters

Keep the purpose consistent; adapt the length and level of permission.

**STAND-UP**

*"What's blocking you today, and what do you need to clear it?"*

USE Keep it to one round of blockers. Do not solve in the room.

**CHAT MESSAGE**

*"Checking whether stage two has cleared since this morning. No rush if not."*

USE One question only. Keep it low-pressure.

**EMAIL**

*"I wanted to flag a recurring blocker on [process] before it affects SLA further."*

USE Use a clear subject and one action.

**HANDOVER NOTE**

*"Open items for the next shift: [item], time-sensitive by [time]."*

USE Record status and timing, not the full story.

**INCIDENT NOTE**

*"Confirmed impact: [issue], affecting [stage] since [time]. Escalated to [team]."*

USE Record facts and escalation, not opinions.

**COACHING NOTE**

*"Checked in on [step] with [name]; agreed to revisit on [date]."*

USE Keep it factual and forward-looking.

**CHANNEL CHECK**

Approved channel? Facts confirmed? Wording suitable for the audience? Clear next step?

# Respectful exits and stop signals

Trust grows when people can decline without being challenged.

**CLEAR NO**

Person: "This can't be resolved the way you're suggesting."

Leader: "Understood. I'll record it and find another way."

**NO FOLLOW-UP**

Person: "Please don't chase me on this today."

Leader: "Of course. I'll follow up at the agreed time instead."

**NOT NOW**

Person: "This isn't a good time to go through it."

Leader: "No problem. Would after the shift work better?"

**ALREADY HANDLED**

Person: "I've already raised this with my supervisor."

Leader: "That makes sense. I won't duplicate that conversation."

**INFORMATION ONLY**

Person: "Just send me the updated steps."

Leader: "Certainly. Which part should it focus on?"

**CONVERSATION COMPLETE**

Person: "That answers my question."

Leader: "Great. I'll leave it there unless anything changes."

**STOP SIGNALS**

A direct decline, a request to escalate, visible frustration, repeated deflection or a request outside your role. Stop, record and use the correct internal process.

# Prompt library - frontline

Frontline team members and new starters. Choose one prompt, then follow the answer.

---

## 01 OPTIONAL PROMPT

"How is today's workload sitting with you?"

## 02 OPTIONAL PROMPT

"Which part of the process feels slowest?"

## 03 OPTIONAL PROMPT

"Would it help to walk through that step together?"

## 04 OPTIONAL PROMPT

"What's felt most confusing this week?"

## 05 OPTIONAL PROMPT

"Which step would you like to see again?"

## 06 OPTIONAL PROMPT

"What would make today easier?"

## USE WELL

One prompt, a real pause and a response based on what the person actually said.

# Prompt library - leadership

Team leaders and supervisors. Choose one prompt, then follow the answer.

---

## 01 OPTIONAL PROMPT

**"How is the team tracking against SLA?"**

## 02 OPTIONAL PROMPT

**"Where is the queue building up?"**

## 03 OPTIONAL PROMPT

**"What's the biggest risk to SLA today?"**

## 04 OPTIONAL PROMPT

**"Where would extra hands help most?"**

## 05 OPTIONAL PROMPT

**"Would a short huddle help align the team?"**

## 06 OPTIONAL PROMPT

**"What's worked well on busy days before?"**

## USE WELL

One prompt, a real pause and a response based on what the person actually said.

# Prompt library - quality & review

QA reviewers and error review conversations. Choose one prompt, then follow the answer.

## 01 OPTIONAL PROMPT

“What’s the pattern in recent reviews?”

## 02 OPTIONAL PROMPT

“Is it a training gap or a process gap?”

## 03 OPTIONAL PROMPT

“Is this isolated or a wider pattern?”

## 04 OPTIONAL PROMPT

“Was there a check that could have caught this?”

## 05 OPTIONAL PROMPT

“What would prevent a repeat?”

## 06 OPTIONAL PROMPT

“What’s improved since the last review cycle?”

## USE WELL

One prompt, a real pause and a response based on what the person actually said.

# Prompt library - handover & escalation

Cross-shift handover and customer escalation. Choose one prompt, then follow the answer.

## 01 OPTIONAL PROMPT

**“What does the next shift need to know?”**

## 02 OPTIONAL PROMPT

**“Is anything time-sensitive or still open?”**

## 03 OPTIONAL PROMPT

**“What's the customer's main concern?”**

## 04 OPTIONAL PROMPT

**“Is this within your authority to resolve?”**

## 05 OPTIONAL PROMPT

**“Who else needs to be looped in?”**

## 06 OPTIONAL PROMPT

**“Would a warm handover to a specialist help?”**

## USE WELL

One prompt, a real pause and a response based on what the person actually said.

# Prompt library - process design

Workflow owners and process leads. Choose one prompt, then follow the answer.

---

## 01 OPTIONAL PROMPT

**“Does this still match how the team actually works?”**

## 02 OPTIONAL PROMPT

**“Where do people work around the process?”**

## 03 OPTIONAL PROMPT

**“Has volume or context changed since this was designed?”**

## 04 OPTIONAL PROMPT

**“What would the team change if they could?”**

## 05 OPTIONAL PROMPT

**“Would a small pilot change be worth testing?”**

## 06 OPTIONAL PROMPT

**“What's the risk of leaving this as-is?”**

## USE WELL

One prompt, a real pause and a response based on what the person actually said.



# Manager coaching and role-play

Coach behaviour that creates useful conversations, not memorised wording.

## FIVE-MINUTE ROLE-PLAY

1. Choose one audience and a realistic scenario.
2. Leader uses one opener; partner gives a real response.
3. Leader reflects, clarifies and offers one next step.
4. Repeat once with fewer words.
5. Agree one behaviour to use in the next shift block.

## OBSERVATION CHECKLIST

- |                                                 |                                                        |
|-------------------------------------------------|--------------------------------------------------------|
| ✓ Context was clear and tone appropriate.       | ✓ One question was asked at a time.                    |
| ✓ The leader paused instead of filling silence. | ✓ The response accurately reflected the blocker.       |
| ✓ The next step was specific and owned.         | ✓ An escalation was handled through the right pathway. |

## COACHING QUESTIONS

- What sounded natural?
- Where did you decide too early?
- What was the actual blocker here?
- How could you say it in half the words?
- Was the next step agreed or assumed?

### PROGRESSION

Start with opener and pause. Then add reflection, clarification, root-cause discipline and clean handover documentation.

# Measure definitions and conversion

Use shared definitions so activity can be coached consistently.

| MEASURE                   | DEFINITION                                                       |
|---------------------------|------------------------------------------------------------------|
| <b>Attempt</b>            | An approved stand-up, review conversation or genuine escalation. |
| <b>Conversation</b>       | Two-way exchange where a blocker or cause is discussed.          |
| <b>Blocker identified</b> | A stated bottleneck, risk or process gap.                        |
| <b>Next step agreed</b>   | Action, owner, date and channel confirmed.                       |
| <b>Review completed</b>   | The agreed review or escalation discussion took place.           |
| <b>Outcome</b>            | Resolved, escalated, process change or no action recorded.       |

## WEEKLY CONVERSION RATIOS

|                          |                                                      |
|--------------------------|------------------------------------------------------|
| <b>Conversation rate</b> | Conversations ÷ attempts                             |
| <b>Blocker rate</b>      | Blockers identified ÷ conversations                  |
| <b>Next-step rate</b>    | Agreed next steps ÷ blockers                         |
| <b>Completion rate</b>   | Completed reviews ÷ agreed next steps                |
| <b>On-time follow-up</b> | Follow-ups completed by agreed date ÷ follow-ups due |

# Measure + improve

Track behaviour, quality and progression - not only settled outcomes.

## WEEKLY SCORECARD

|             |                                                          |
|-------------|----------------------------------------------------------|
| Activity    | Attempts and genuine conversations.                      |
| Quality     | Blockers identified and handovers documented completely. |
| Progression | Agreed next steps and completed reviews.                 |
| Outcomes    | SLA performance, error rate and resolved escalations.    |
| Learning    | Best pathway, recurring blocker and coaching focus.      |

## WEEKLY REVIEW QUESTIONS

- Which audience created the most useful conversations?
- Where did people hesitate, escalate or disengage?
- Did I reflect the cause before offering a fix?
- Which channel produced the clearest responses?
- What one behaviour will I practise next week?

### FINAL REMINDER

The goal is not to sound busy. It is to make the next shift clearer, safer and more consistent.

# Daily Rhythm & Consistency worksheet

Use one sheet per activity block. Keep the next step small, specific and agreed.

## SESSION DETAILS

DATE

FOCUS ROUTE

TARGET

## CONTACT LOG

| CONTACT | AUDIENCE / ROUTE | BLOCKER OR NEED | NEXT STEP | FOLLOW-UP DATE |
|---------|------------------|-----------------|-----------|----------------|
|         |                  |                 |           |                |
|         |                  |                 |           |                |
|         |                  |                 |           |                |
|         |                  |                 |           |                |
|         |                  |                 |           |                |

## DAILY REVIEW

WHAT WORKED?

WHAT OBJECTION OR HESITATION DID I HEAR?

WHAT WILL I CHANGE IN THE NEXT BLOCK?

## FOLLOW-UP CHECK

FOLLOW-UPS DUE

PROCESS UPDATED

NEXT BLOCK